

Juan Ros, CFP®, CSPG, AEP®, CEPA, CVGA® is a Financial Advisor in the Thousand Oaks, California office of Forum Financial Management, LP. Prior to joining Forum and its predecessor firm, Lamia Financial Group, Inc., Juan held various senior fundraising positions at the Ronald Reagan Presidential Foundation, Occidental College and the ALS Association, helping to raise millions of dollars in current and deferred gifts.

Juan works closely with legacy-minded families and business owners to enhance, protect and help transfer their wealth, particularly when charitable planning is involved. Since 2015, Juan has served on the faculty of the American Institute for Philanthropic Studies, which awards the CSPG designation. He is a frequent contributor and member of the editorial board for the monthly publication Planned Giving Today.

Juan serves on the board of the nonprofit Fit 4 the Cause. He is an active member of ProVisors, the Financial Planning Association, the National Association of Estate Planners and Councils, the Exit Planning Institute, and is past president and member of the Conejo Valley Estate Planning Council and the Los Angeles Council of Charitable Gift Planners.

Juan is a CERTIFIED FINANCIAL PLANNER™ professional. He holds the Certified Specialist in Planned Giving designation, the Accredited Estate Planner® designation, the Certified Exit Planning Advisor designation, and the Certified Value Growth Advisor® designation. Juan earned his MBA with an emphasis in Financial Planning from California Lutheran University in Thousand Oaks, California. He holds a Bachelor of Arts degree from The Pennsylvania State University in State College, Pennsylvania.

Prior to his work in wealth management and philanthropy, Juan worked in the film industry. His name can be seen in the credits of numerous films including “Cape Fear,” “JFK” and “The Godfather Part III.” A father of two, Juan resides in Ventura County, California, with his wife Stacy and dog Sasha.

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